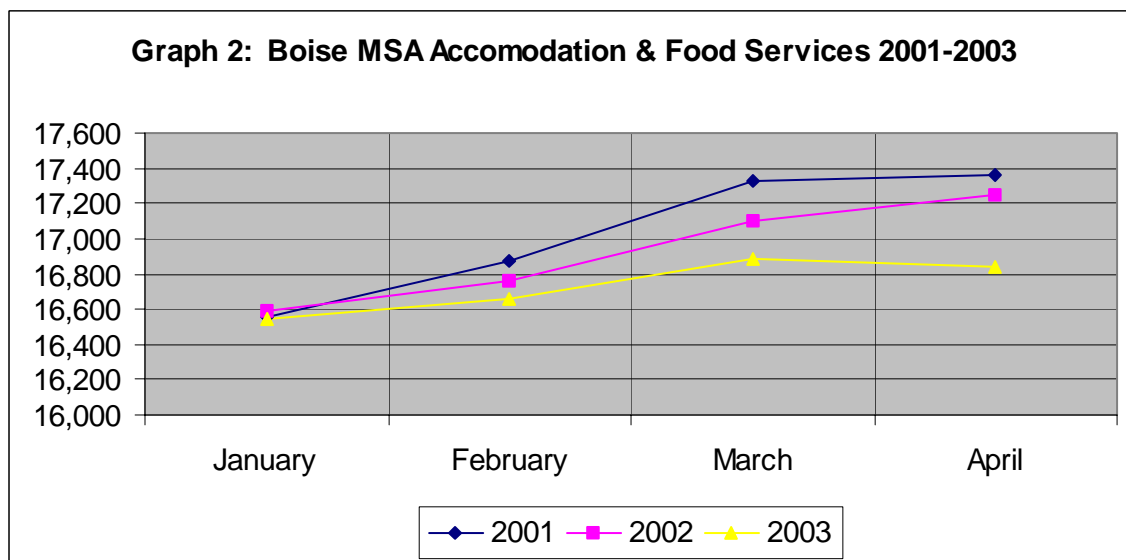
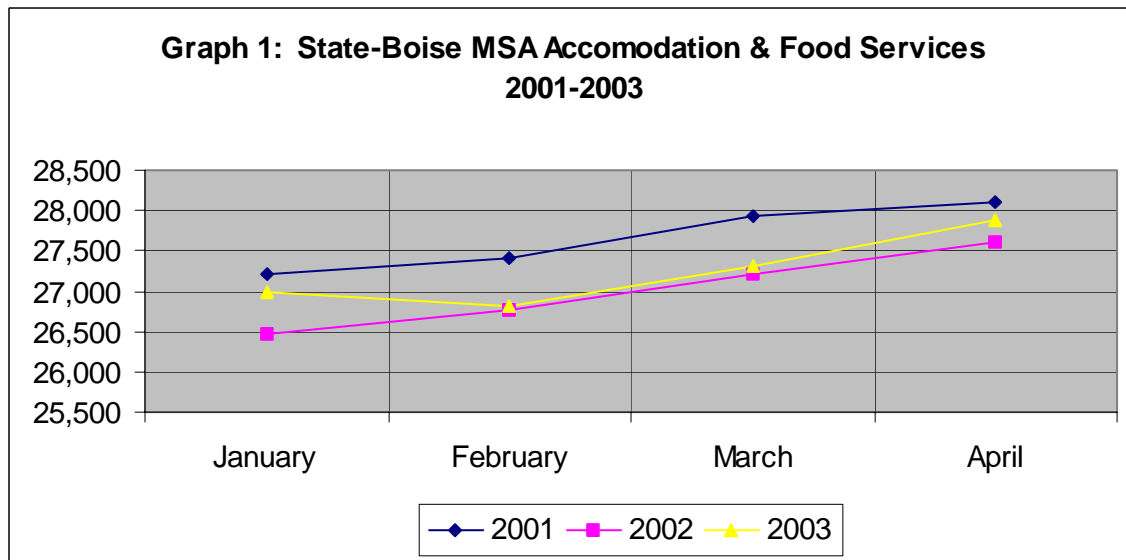


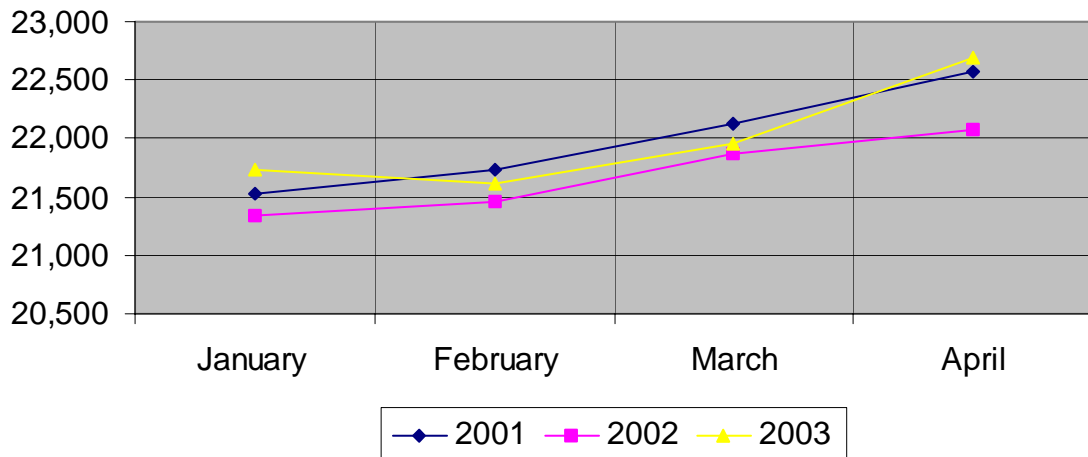
## Accommodation and Food Services Industry: April 2003

From January to April in each of the last three years, the Boise Metropolitan Statistical Area (MSA) has made up approximately 38 percent of total employment in Idaho for the *Accommodation and Food Services* industry. Both the Boise MSA and the rest of the state follow the same seasonal patterns for the first four months of the year. However, if the preliminary estimates\* should hold true in April 2003, there is beginning to be a diverging pattern which seems logical considering the employment losses the Boise MSA has suffered. While the rest of the state (minus the Boise MSA) continues to show increases in the *Accommodation and Food Services* industry through April 2003, that industry has shown a decline in employment in the Boise MSA. See Graphs 1 & 2.

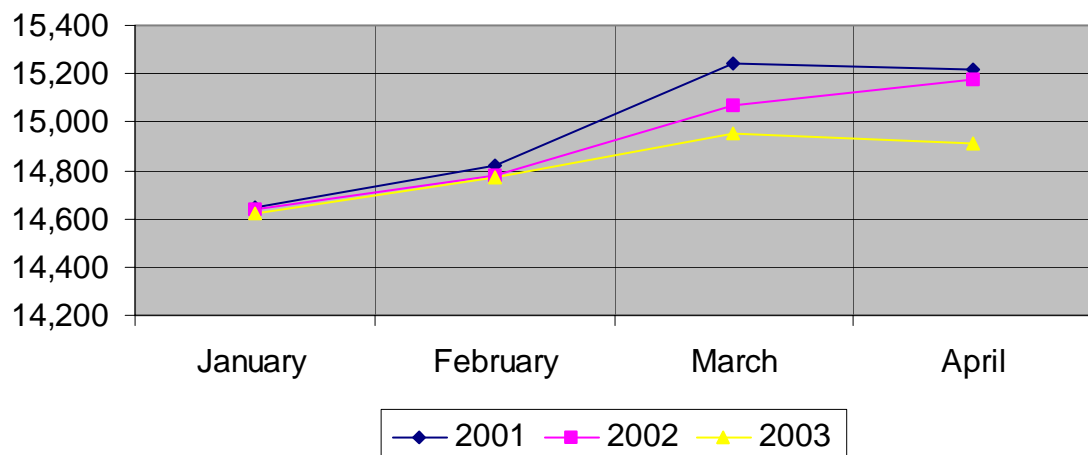


The changes in this industry can further be seen by comparing employment of a component of *Accommodation and Food Services* known as Food Services and Drinking Places. Graphs 3 and 4 below show a decline in April 2003 in the Boise MSA, while the rest of the state continues to increase.

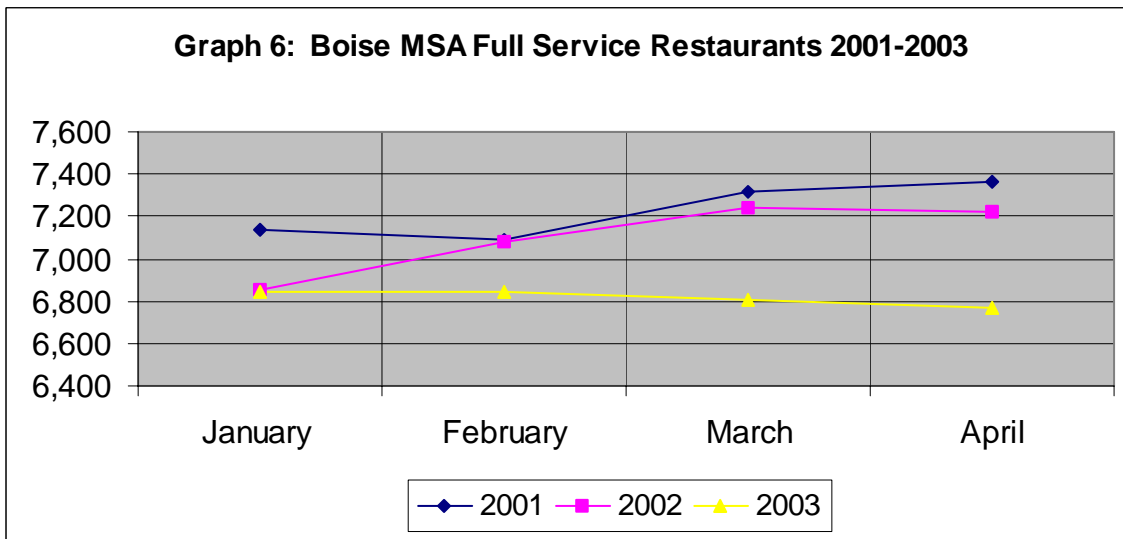
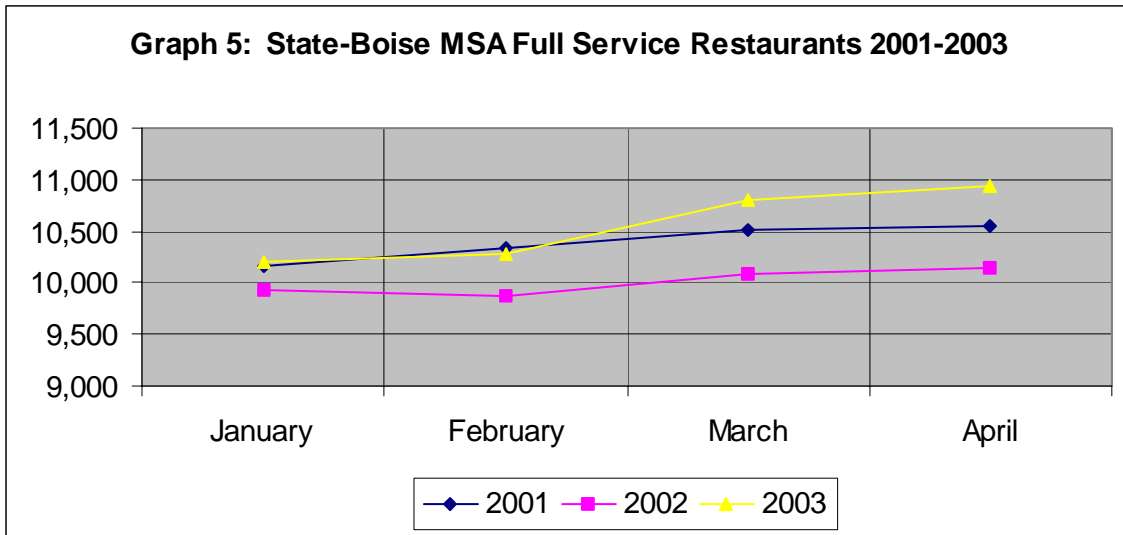
**Graph 3: State-Boise MSA Food Service & Drinking Places  
2001-2003**



**Graph 4: Boise MSA Food Services and Drinking Places 2001-2003**



The losses in the Boise MSA can be further narrowed down to a more micro level component of Food Service and Drinking Places titled Full Service Restaurants shown in Graphs 5 and 6. Keeping in mind that these numbers are preliminary\* and are subject to change, they do show that employment in full service restaurants is on the decline and limited service restaurants and drinking places appear to be keeping employment at its current level.



This preliminary data would suggest that people are budgeting less for full service restaurants, making the decision to settle for less expensive options during these rough economic times. Perhaps a “multiplier effect” is being realized. Generally with significant employment losses, which have been the case in the Boise MSA over the last couple of years, employment in other industries suffers as well. This loss of jobs in other industries is known as a multiplier effect. Time will tell if preliminary estimates are correct and if this new trend will continue.

\*Preliminary Estimates: Employment estimates are made twice each month. The first time they are known as preliminary, the second time around, which is a month later, they are known as final, which are also reconciled against the actual employment figures at the end of the year.